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Austria

Oilseeds and Products

Annual

2003

Approved by:

Paul Spencer-MacGregor

U.S. Embassy

Prepared by:

Dr. Roswitha Krautgartner

Report Highlights: Due to frost damage in the northern and northeastern parts of Austria, the winter rapeseed area planted in summer 2002 is reduced by up to 10%. The rapeseed harvest in 2002 was below average because of disease and pests. In contrast, growing conditions for soybeans in 2002 were good and the harvest was satisfactory. Soybean meal imports in 2001/2002 were strong and are expected to remain strong. The new Austrian government intends to promote renewable fuels made from oilseeds, which in the longer term might cause an increase in rapeseed and sunflower production.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Vienna [AU1], AU

Production

Area

The total area of oilseeds increased slightly from 104,336 ha in 2001 to 107,053 ha in 2002. The main oilseed crop in Austria is winter rapeseed, accounting for 55% of the total production. Sunflowerseed make up 25.2% and soybeans 15.2% of production. There is also a considerable production area of oilseed pumpkins in the southeastern regions of Austria. (Pumpkinseed oil is an Austrian speciality, which is recognized by the EU under the regional label "Steirisches Kuerbiskernöl.")

The 55,811 ha rapeseed area harvested in 2002 corresponded roughly to 2001. The area for rape sown in the summer of 2002 (harvest 2003) is estimated to decline by 4% compared to rape sown in summer 2001. Due to low temperatures in the north and north east of Austria - under -15 centigrade - and with little protective snow cover, there will possibly be a reduction in the harvested area of oilseed rape. In some areas, 50% of the planted area is showing heavy frost damage. For this reason yield estimates are also lower. Not more than 2.2MT per ha on an average can be expected.

Soybean production in 2002 dropped more than 2,000 ha to 13,995 ha. Due to good harvest in 2002 it is estimated, that the area in 2003 will rise slightly.

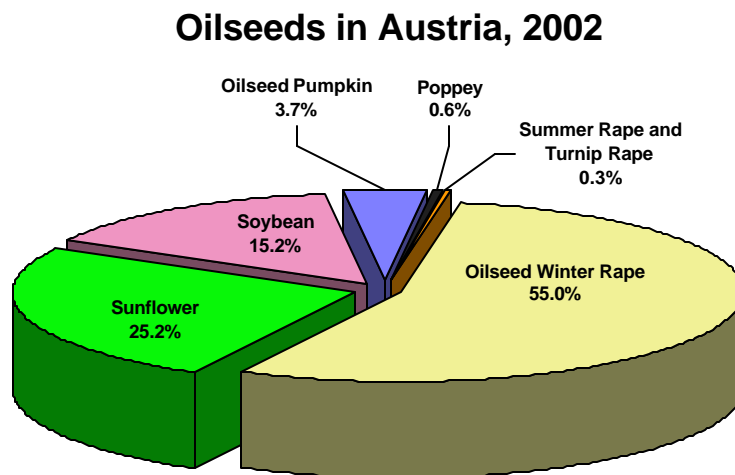


Figure 1, Source: Statistik Austria, Schnellbericht 1.12, Nov. 2002

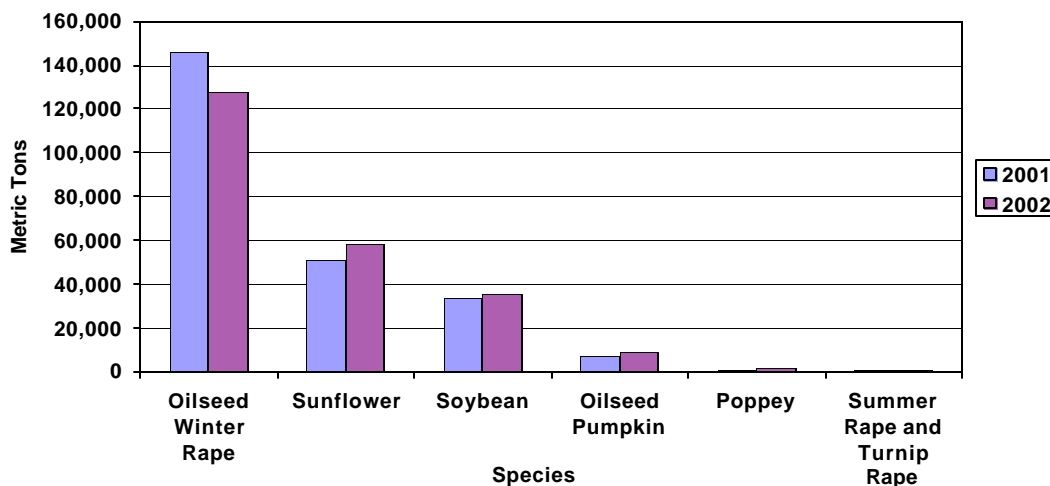
Yields

The total oilseed production in 2002 was 244,885 MT. This was an increase of 6.5% compared to the previous year. The increase in production was mainly due to a larger harvest of sunflowerseed and soybeans.

The rapeseed harvest in 2002 was 12.3% less than in 2001 and totaled only 128,029MT. This was mainly caused by lower yields, which accounted to just 23,3MT per ha. Yield reductions can be partially explained by lower input use by farmers and there was damage, in some cases severe, from phoma disease and beetles. Sowing in summer 2002 was affected by dry conditions after sowing and cold damage at the end of winter.

The soybean harvest in 2002 was satisfactory. Compared to 2001 average yield per ha rose from 20.7 to 25,2MT per ha. Although acreage decreased by more than 2,000ha, overall tonnage was up to 35,329MT in 2002 (versus 33,847MT in 2001). Autumn 2002 presented good ripening conditions for soybean. With a slight increase in acreage and a small yield estimate, the 2003 harvest is expected to be about the same as in 2002.

**Oilseeds Harvest 2002 Compared to 2001
(Metric Tons)**



Source: Statistik Austria, Schnellbericht 1.12, Nov. 2002

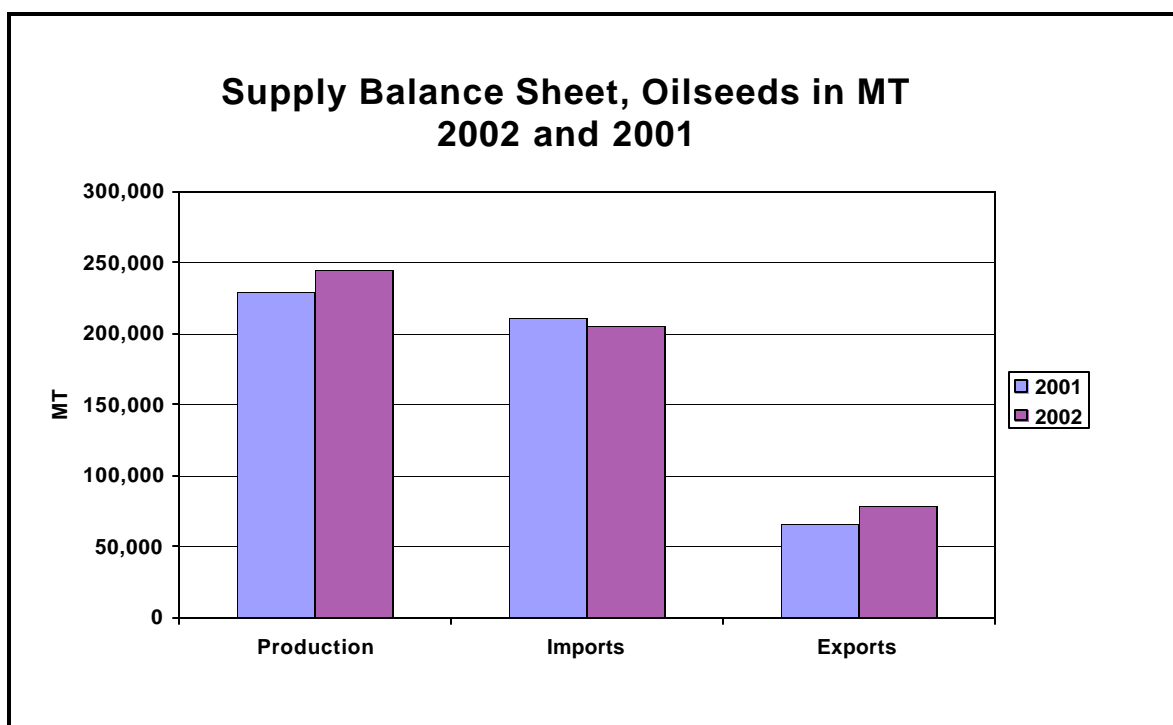
Trade

Total 2002 oilseed imports declined by 6,253MT to 204,903MT compared to the previous year while exports rose from 65,077MT to 78,625MT.

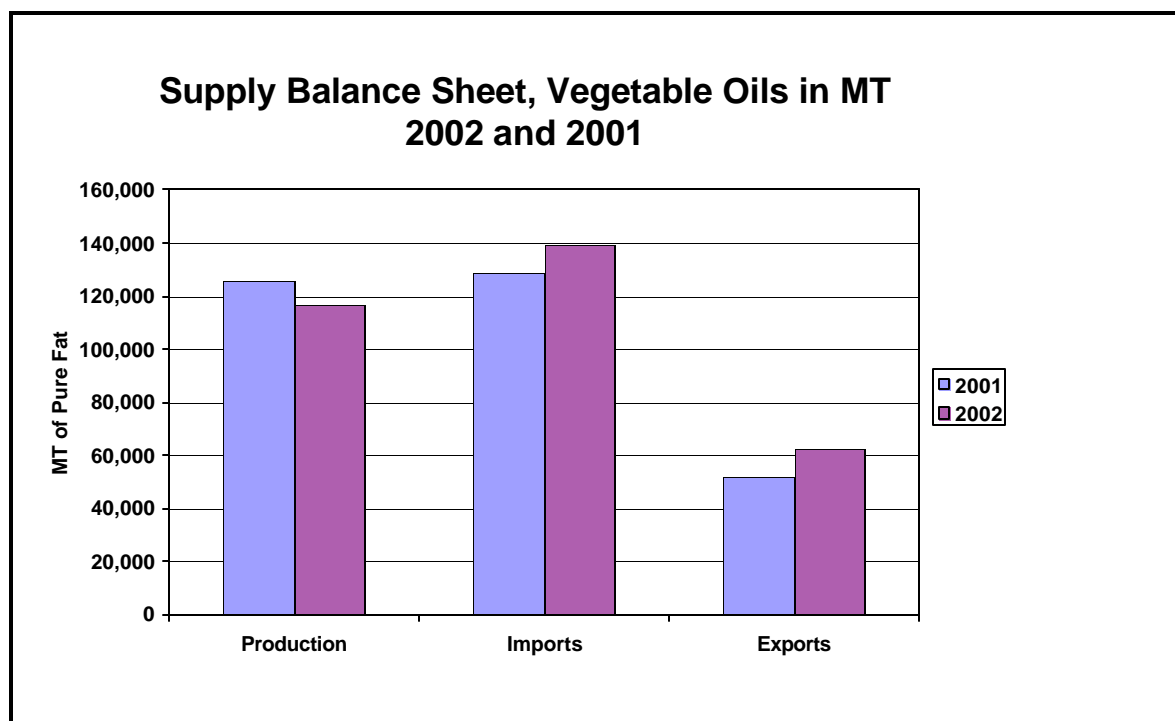
Trade in soybeans and rapeseed is small. As in recent years, 2001/2002 soybean and meal imports came mainly from other EU countries, particularly Germany. The bulk of rapeseed came from Eastern Central European countries, mainly Slovakia, Hungary and the Czech Republic.

Rapeseed meal imports are insignificant. However, each year, large quantities of soybean meal are required. In 2001/2002, 549,157MT were imported, which is around 4,4% over the 2000/2001 volume. The predominant share came from crushing facilities in Italy, Germany and the Netherlands. Also relatively large quantities came from Argentina.

In 2002/2003, import volume is expected to remain high level. On the one hand there will be a high demand for oilseed meal, because of reduced harvest of rapeseed. On the other hand, there is strong demand in Austria for non-GM foods and feed. Demand for so-called 'GM-free' soybeans may increase. There is also some demand for non-GM soybean meal by organic farmers.



Source: Statistik Austria



Source: Statistik Austria

Policy

The new Austrian government and the new Agricultural Minister of Austria are heavily promoting renewable energy and renewable fuel in their governmental platform. They would like the Austrian petroleum industry to have minimum use quotas for diesel made from oilseeds ("Biodiesel"). This if enacted in law, this will result in a higher oilseed (rapeseed and sunflower) production in Austria.

PS&D Rapeseed

PSD Table						
Country	Austria					
Commodity	Oilseed, Rapeseed				(1000 HA)	(1000 MT)
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[O ld]	Post Estimate[New]	USDA Official[O ld]	Post Estimate[New]
Market Year Begin		10/2001		10/2002		10/2003
Area Planted	56	56	56	55	0	53
Area Harvested	56	56	56	55	0	48
Beginning Stocks	23	0	31	0	31	0
Production	147	147	150	128	0	106

MY Imports	85	49	75	75	0	90
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	9	3	8	8	0	10
TOTAL SUPPLY	255	196	256	203	31	196
MY Exports	24	22	25	24	0	14
MY Exp. to the EC	24	22	25	24	0	14
Crush Dom. Consumption	200	174	200	179	0	182
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	0	0	0	0	0	0
TOTAL Dom. Consumption	200	174	200	179	0	182
Ending Stocks	31	0	31	0	0	0
TOTAL DISTRIBUTION	255	196	256	203	0	196
Calendar Year Imports	85	49	75	44	0	65
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	24	22	25	17	0	15
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PS&D Soybeans

PSD Table						
Country	Austria					
Commodity	Oilseed, Soybean				(1000 HA)	(1000 MT)
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[O ld]	Post Estimate[New]	USDA Official[O ld]	Post Estimate[New]
Market Year Begin		10/2001		10/2002		10/2003
Area Planted	16	16	14	14	0	15
Area Harvested	16	16	14	14	0	15
Beginning Stocks	0	0	0	0	0	0
Production	34	34	30	35	0	35
MY Imports	20	20	27	23	0	22
MY Imp. from U.S.	1	1	1	0	0	0

MY Imp. from the EC	20	20	21	20	0	20
TOTAL SUPPLY	54	54	57	58	0	57
MY Exports	14	14	15	13	0	13
MY Exp. to the EC	10	10	10	10	0	10
Crush Dom. Consumption	0	0	0	0	0	0
Food Use Dom. Consump.	20	20	20	20	0	20
Feed,Seed,Waste Dm.Cn.	20	20	22	25	0	24
TOTAL Dom. Consumption	40	40	42	45	0	44
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	54	54	57	58	0	57
Calendar Year Imports	20	20	27	23	0	24
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	14	14	15	13	0	13
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Rapeseed Prices

Prices Table			
Country	Austria		
Commodity	Oilseed, Rapeseed		
Prices in	Euro	per uom	MT
Year	2001	2002	% Change
Jan	145.3	188.9	30.01%
Feb	145.3	188.9	30.01%
Mar	145.3	188.9	30.01%
Apr	145.3	188.9	30.01%
May	145.3	188.9	30.01%
Jun			
Jul	191.4	186	-2.82%
Aug	194.4	178.1	-8.38%

Sep	191.7	181.2	-5.48%
Oct	189.7	181.6	-4.27%
Nov	194.5	189	-2.83%
Dec	188.9		-100.00%
Exchange Rate	0.92902	Local currency/US \$	

Trade Matrix - Soybeanmeal

Import Trade Matrix			
Country	Austria		
Commodity	Meal, Soybean		
Time period		Units:	10 2001
Imports for:			1
U.S.		U.S.	0
Others		Others	
		Italy	221552
		Germany	160086
		Netherlands	153162
		Argentina	11808
		Brazil	2060
Total for Others	0		548668
Others not Listed			489
Grand Total	0		549157